UAD Categories to ProVal Groups Comparison Edit Reporting
Multi Step Documentation
Certification Checklist 2005C
Revised 4/18/05

This reporting sub-system compares the group codes used in ProVal to what is currently residing in the category file within the UAD system in the AS/400. The final edit report only uses the parcel records from the ProVal system which have been "checked" to be processed. Only the parcels that do not agree will be listed. That is, if there is a group code being used in ProVal, but that category is not in the UAD system, then that parcel would be listed. The same would apply if there was a category in the UAD system without that same group code being in ProVal.
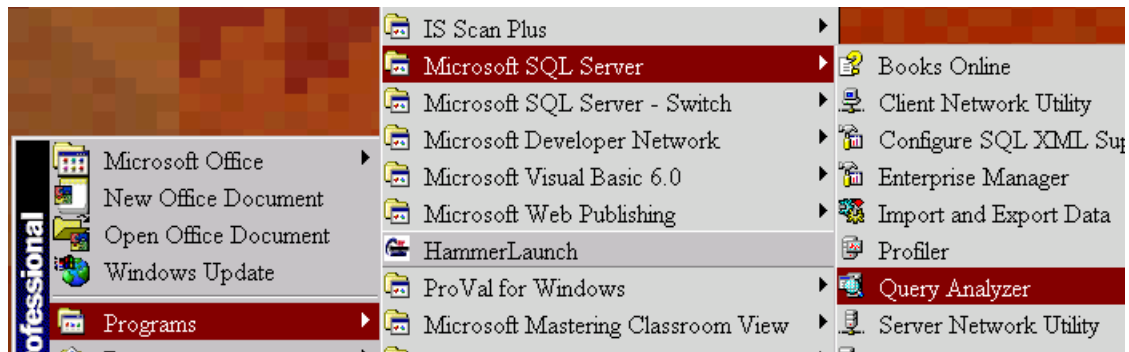
To run this sub-system, you need to have a working knowledge of the Query Analyzer, as well as Crystal Reports. You also need to have access to both of these.
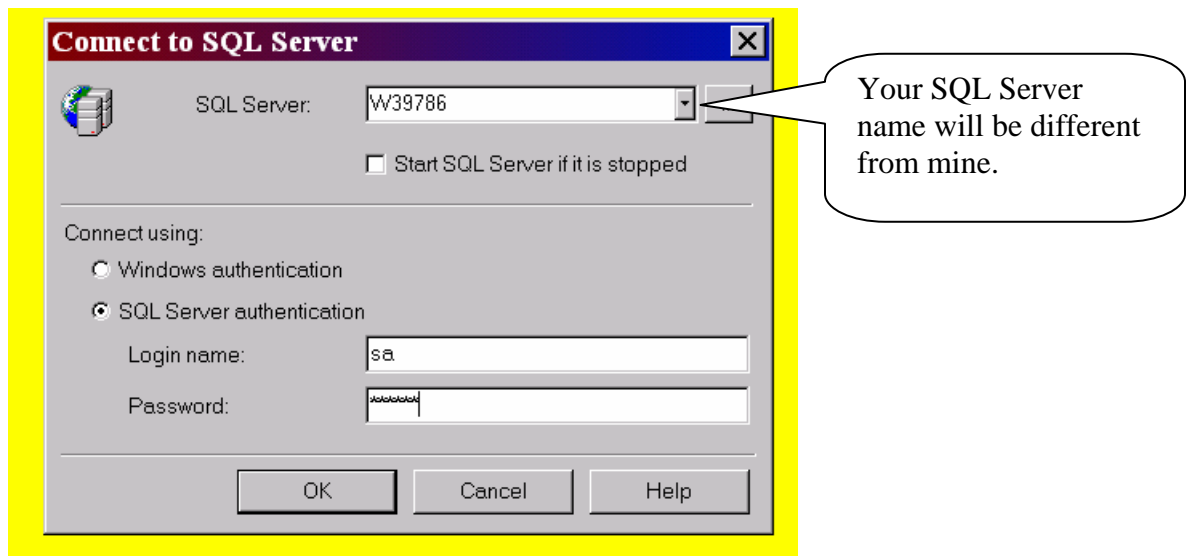
This system requires a 4 step process:

1. **TSB1930-Category to Group Edit-Step 1.sql**: This script has to be run to remove any old tables that might reside.

2. **TSB1930-Category to Group Edit-Step 2.rpt:** This report will create an SQL table in the Common database called "TSB-Categories1" containing one record per parcel from the UAD system with up to 12 categories used. Both "A" & "I" parcels are exported for parcels starting with either "LR", "MH", "SC" or "RP".

3. **TSB1930-Category to Group Edit-Step 3.rpt:** This report will create an SQL table in the Common database called "TSB-Categries2" similar to the last table created. The difference in this table is that only one record per parcel is generated. If there is an "A" & an "I" on the same parcel, then only the "I" is generated.

4. **TSB1930-Category to Group Edit-Step 4.rpt:** This is the edit report that list any parcels that the categories from the UAD system do not agree with the group codes in ProVal

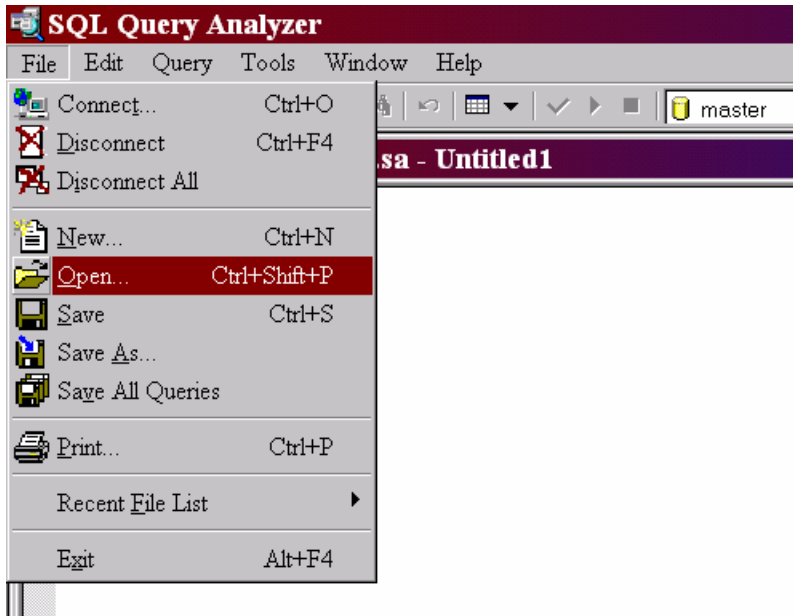The following pages are the detail documentation of the above steps.
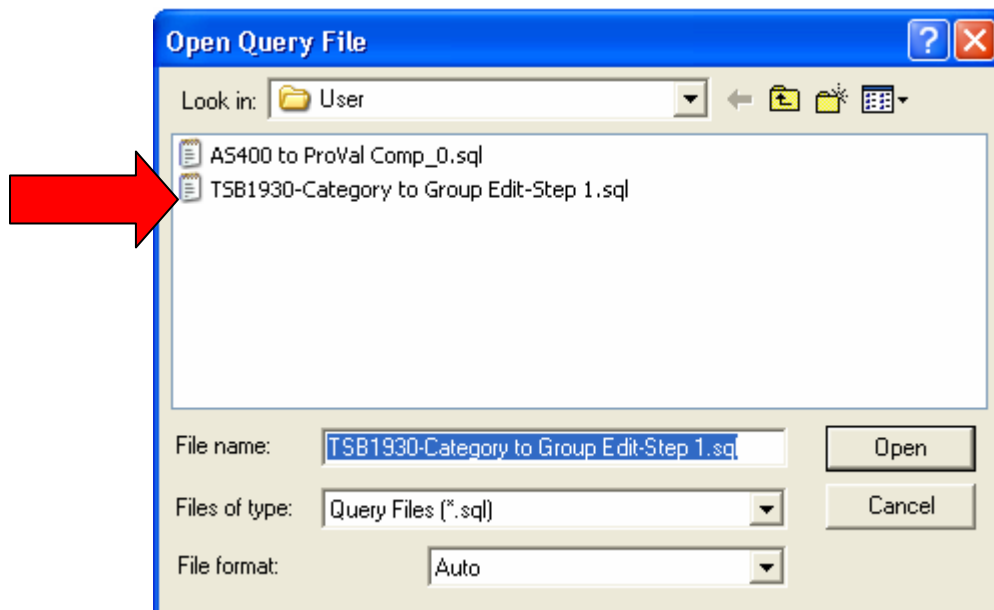
Step 1: Remove the old tables.

1. From the Start button, select Query Analyzer as shown above.

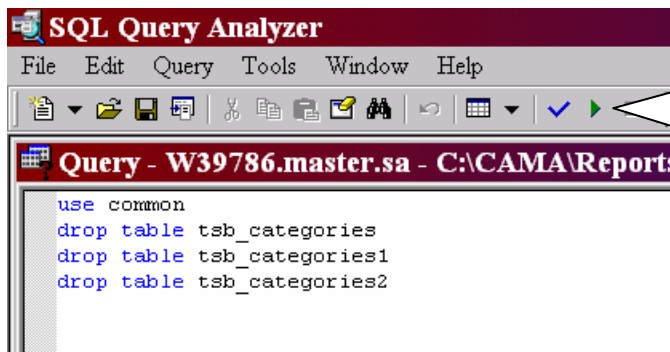
Your SQL Server name will be different from mine.

2. When the above screen pops up, be sure of the following:
   ➢ SQL Server authentication is on
   ➢ Login name is "sa"
   ➢ *IF* your system requires a password, you will need to enter it under Password. If not, be sure this field is blank.
   ➢ Once data is correct, click OK

3. When Query Analyzer opens up, it will open up to a blank screen. At this point, you will need to go to the file menu & select Open (File | Open).

4. When the above screen comes up, you will need to scroll the "Look in" window until you find the "Cama\Reports" directory in your server's directory tree. Next, you will need to locate the above entry "TSB-Category to Group Edit-Step 1.sql", click it, then select Open.

SQL Query Analyzer

File   Edit   Query   Tools   Window   Help

Query - W39786.master.sa - C:\CAMA\Reports

```
use common
drop table tsb_categories
drop table tsb_categories1
drop table tsb_categories2
```

**When this screen pops up, select the green arrow to run this script.
This script will run very quickly.**

5. At this point, you are done with step 1. You can now close out of Query Analyzer.
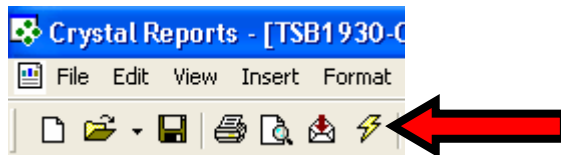
Step 2: **Create SQL Table called "TSB_Categories1:**

1. Create an ODBC System DSN pointing to the AS400
   - ➢ General Tab
     - Driver: Client Access ODBC driver (32 bit)
     - Data Source Name: AS400
     - AS/400 System: 10.30.34.101
   - ➢ Server Tab
     - Naming Convention: SQL
     - SQL Default Library: QGPL
     - Library List: This is the name of the library in the AS400 (i.e. Lewis).

2. Open Windows Explorer and navigate to: Manatron\ProValPlus\Reports\User, in your directory on your server drive. Double click on the file *TSB1930-Category to Group Edit-Step 2.rpt*, this will open the file in Crystal Reports.
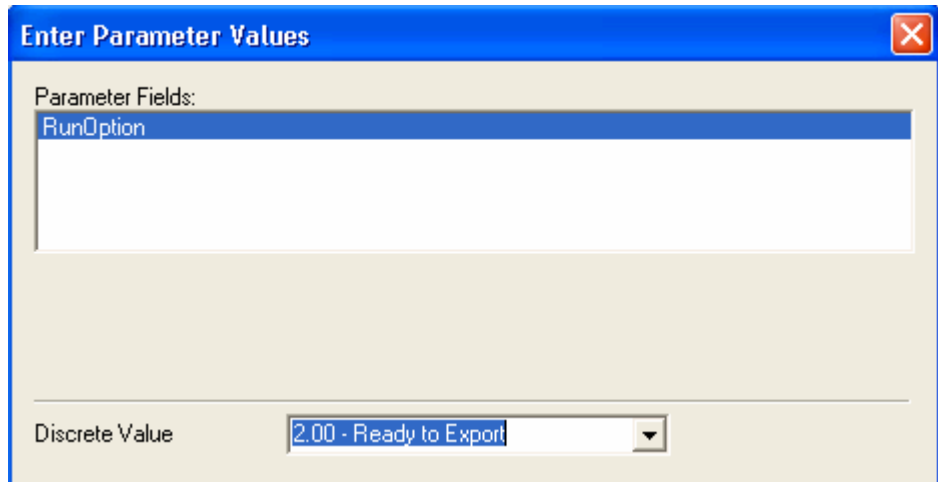
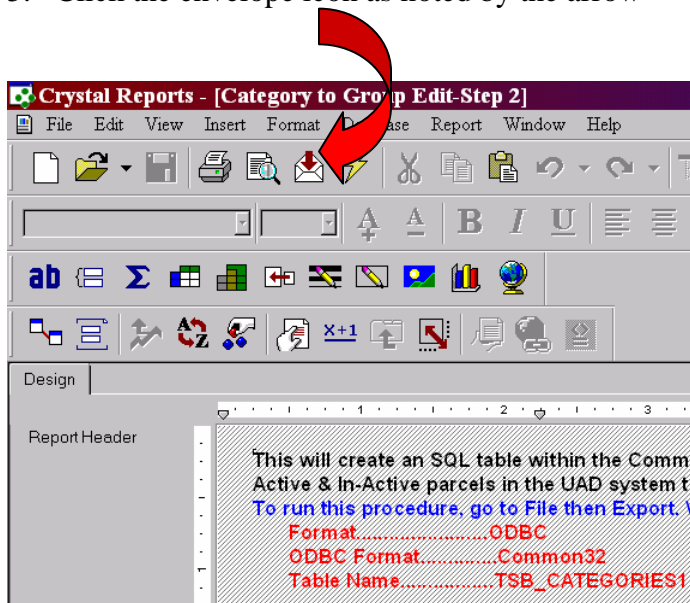| Name ▲	Size	Type	Date Modified
TSB1811-Audit Trail-Active Parcel_OLD.rpt	122 KB	Crystal Reports	11/19/2003 08:28 PM
TSB1830C-Batch Valuation Analysis.rpt	101 KB	Crystal Reports	3/5/2004 03:54 PM
TSB1850-Basements Without Finish Area - Residential.rpt	83 KB	Crystal Reports	2/3/2004 09:20 AM
TSB1910-Category 15 Without 37 Analysis.rpt	123 KB	Crystal Reports	11/20/2003 08:04 PM
TSB1930-Category to Group Edit-Step 1.sql	1 KB	SQL Script File	2/28/2003 03:14 PM
TSB1930-Category to Group Edit-Step 2.rpt	121 KB	Crystal Reports	3/3/2003 08:13 AM
TSB1930-Category to Group Edit-Step 3.rpt	10 KB	Crystal Reports	3/3/2003 08:14 AM
TSB1930-Category to Group Edit-Step 4.rpt	138 KB	Crystal Reports	3/9/2004 12:50 PM
TSB1940-Certification Analysis.rpt	127 KB	Crystal Reports	11/20/2003 08:11 PM
TSB1960C-Certified Parcels Summary.rpt	85 KB	Crystal Reports	3/14/2004 02:47 PM
TSB1980-Certified Parcels Summary_by Method.rpt	123 KB	Crystal Reports	11/20/2003 08:18 PM
TSB2040-Chart-Appraisals By Appraiser.rpt	15 KB	Crystal Reports	1/21/2004 08:59 PM

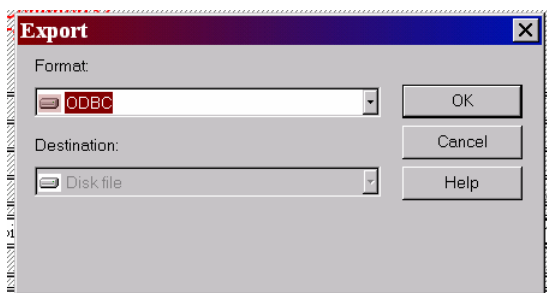3. Click on the lightening bolt to run the report
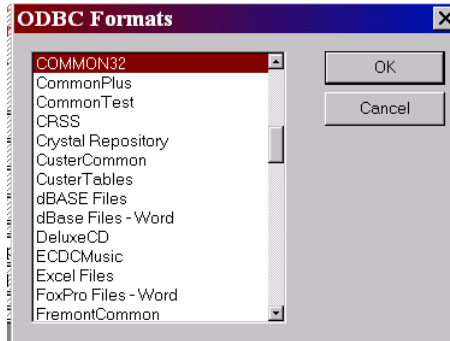
4. Select the run option "Ready to Export"

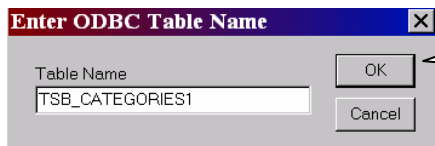5. Click the envelope icon as noted by the arrow

6. Under Format, select ODBC, and click OK.

7. Under the ODBC Formats, select "COMMON32" (this is the destination data source for the TSB_Categories1 table), and click OK.

8. Enter the Table name

If running **step 2**, be sure the table name listed here is entered.
If running **step 3**, be sure the table name "**TSB_CATEGORIES2**" is entered.

At this point, the table will be created.

Step 3: Create SQL Table called "TSB_Categories2:

1. Open Windows Explorer and navigate to: Manatron\ProValPlus\Reports\User, in your directory on your server drive. Double click on the file *TSB1930-Category to Group Edit-Step 3.rpt*, this will open the file in Crystal Reports

Name ▲	Size	Type	Date Modified
TSB1811-Audit Trail-Active Parcel_OLD.rpt	122 KB	Crystal Reports	11/19/2003 08:28 PM
TSB1830C-Batch Valuation Analysis.rpt	101 KB	Crystal Reports	3/5/2004 03:54 PM
TSB1850-Basements Without Finish Area - Residential.rpt	83 KB	Crystal Reports	2/3/2004 09:20 AM
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TSB2040-Chart-Appraisals By Appraiser.rpt	15 KB	Crystal Reports	1/21/2004 08:59 PM

2. At this point, go through the process above that you used in Step 2, substituting "Step 3" requirements where "Step 2" is used

You are now finished with creating the tables needed from the UAD system.

Special Note: From this point forward, steps 1, 2, & 3 only need to be run if category changes are made in the UAD system.
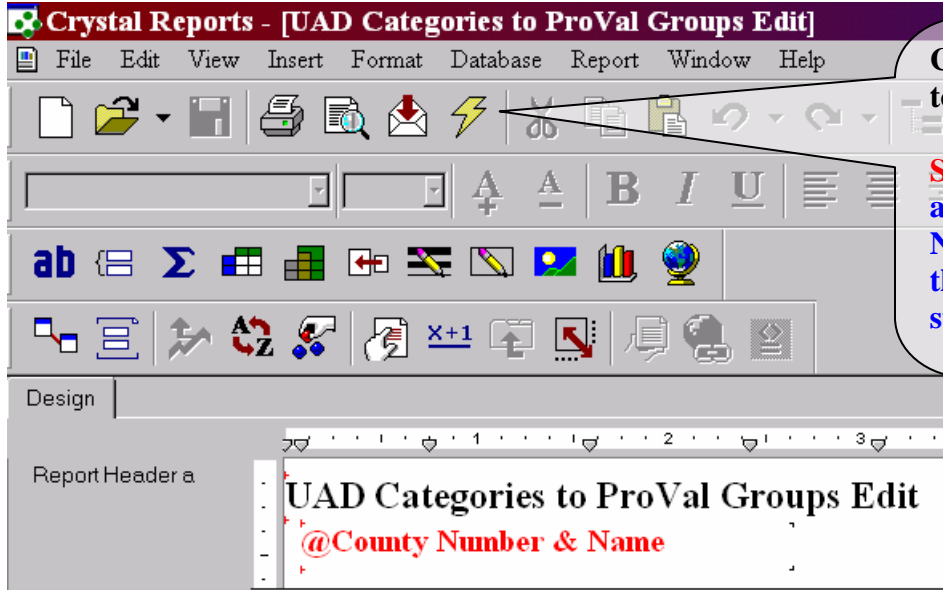
Step 4: Run the edit report comparing UAD category entries to ProVal's group codes per parcel:

1. Open Windows Explorer and navigate to: Manatron\ProValPlus\Reports\User, in your directory on your server drive. Double click on the file *TSB1930-Category to Group Edit-Step 4.rpt*, this will open the file in Crystal Reports.

Name ▲	Size	Type	Date Modified
TSB1811-Audit Trail-Active Parcel_OLD.rpt	122 KB	Crystal Reports	11/19/2003 08:28 PM
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TSB1930-Category to Group Edit-Step 2.rpt	121 KB	Crystal Reports	3/3/2003 08:13 AM
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TSB1930-Category to Group Edit-Step 4.rpt	138 KB	Crystal Reports	3/9/2004 12:50 PM
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TSB2040-Chart-Appraisals By Appraiser.rpt	15 KB	Crystal Reports	1/21/2004 08:59 PM

2. In Crystal Reports, click the lightening bolt to run the report.

Click the "lighting bolt" to run the edit report.

Special Note: If changes are made in ProVal & NOT in the UAD system, then this step is the only step that needs to be run.

The following diagram is an example of the report.